



Filing ID #10081525

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Laurel Lee
Status: Member
State/District: FL15

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 08/13/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of Tampa Checking [BA]	SP	\$50,001 - \$100,000	Interest	\$1 - \$200	☐
Golden Touch Fund I, LLC [HE] DESCRIPTION: Private Equity	SP	\$500,001 - \$1,000,000	None		☒
State of Florida Pension [DB]	SP	Undetermined	None		☐
State of Florida Pension [DB]		Undetermined	None		☐
TAL Holdings, 100% Interest [OL] LOCATION: Brandon, FL, US DESCRIPTION: Interest income	SP	\$1,000,001 - \$5,000,000	Interest	\$1 - \$200	☐
Tampa Bay Banking Company [PS] DESCRIPTION: Shareholder in privately held commercial bank holding company located in Tampa, Florida.	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	☐
Truist Checking [BA]		\$100,001 - \$250,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Truist Savings Account [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	☐
Truist Savings FCL [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	☐
TuHURA Biosciences, Inc. - Common Stock (HURA) [ST]	SP	\$15,001 - \$50,000	None		☒
USAA Checking Account [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	☐
Charles Schwab 401K ⇒ Alibaba Group Holding Limited American Depositary Shares each representing eight Ordinary share (BABA) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Charles Schwab 401K ⇒ AT&T Inc. (T) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab 401K ⇒ Bank of America Corporation (BAC) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		☐
Charles Schwab 401K ⇒ Boeing Company (BA) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Charles Schwab 401K ⇒ Cash [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab 401K ⇒ GE HealthCare Technologies Inc. - Common Stock (GEHC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab 401K ⇒ General Electric Company (GE) [ST]	SP	\$100,001 - \$250,000	Tax-Deferred		☐
Charles Schwab 401K ⇒ Intel Corporation (INTC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab 401K ⇒ Nokia Corporation Sponsored American Depositary Shares (NOK) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Charles Schwab 401K ⇒ Nutrien Ltd. Common Shares (NTR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab 401K ⇒	SP	\$100,001 -	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Schwab Value Advantage Money Fund (SWVXX) [MF]		\$250,000			☐
Charles Schwab 401K ⇒ Warner Bros. Discovery, Inc. - Series A (WBD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab 401K ⇒ Wells Fargo & Company (WFC) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Charles Schwab Account LML ⇒ Bank of America Corporation (BAC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Charles Schwab Account LML ⇒ Cash [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	☐
Charles Schwab Account LML ⇒ Caterpillar, Inc. (CAT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Charles Schwab Account LML ⇒ Ford Motor Company (F) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Charles Schwab Account LML ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Charles Schwab Account LML ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☐
Charles Schwab Account LML ⇒ Mosaic Company (MOS) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	☐
Charles Schwab Account LML ⇒ Pfizer, Inc. (PFE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Charles Schwab Account LML ⇒ Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Individual 529 ⇒ Aged Base Core 11-12 Fund [5F] LOCATION: FL		\$1,001 - \$15,000	Tax-Deferred		☐
Individual 529 ⇒ Bromwell 529 - Aged Base Core 9-10 Fund [5P] LOCATION: FL		\$1,001 - \$15,000	Tax-Deferred		☐
John Hancock 401K ⇒		\$50,001 -	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard 500 Index Fund [MF]		\$100,000			☐
JP Morgan SEP ⇒ Apple Inc. (AAPL) [ST]	SP	\$1,000,001 - \$5,000,000	Dividends	\$5,001 - \$15,000	☐
JP Morgan SEP ⇒ AT&T Inc. (T) [ST]	SP	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	☐
JP Morgan SEP ⇒ Bank of America Corp 7% Cumulative Redeemable Preferred Stock (BACRP) [ST]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	☐
JP Morgan SEP ⇒ Bank of America Corporation (BAC) [ST]	SP	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	☐
JP Morgan SEP ⇒ BlackRock Credit Allocation Income Trust (BTZ) [MF] DESCRIPTION: Closed-end mutual fund	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	☐
JP Morgan SEP ⇒ Capital Group Fixed Income ETF Trust Capital Group U.S. Multi-Sector Income ETF (CGMS) [EF]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	☐
JP Morgan SEP ⇒ Cash [BA]	SP	\$100,001 - \$250,000	Interest	\$1 - \$200	☐
JP Morgan SEP ⇒ CBRE Global Real Estate Income Fund Common Shares of Beneficial Interest (IGR) [MF]	SP	None	Dividends	\$5,001 - \$15,000	☒
JP Morgan SEP ⇒ GE HealthCare Technologies Inc. - Common Stock (GEHC) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
JP Morgan SEP ⇒ GE Vernova Inc. Common Stock (GEV) [ST] DESCRIPTION: 4/2/24 spin-off from GE	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	☐
JP Morgan SEP ⇒ General Electric Company (GE) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
JP Morgan SEP ⇒ Global X Russell 2000 Covered Call ETF (RYLD) [EF]	SP	\$50,001 - \$100,000	Dividends	\$5,001 - \$15,000	☐
JP Morgan SEP ⇒ Invesco Senior Income Trust Common Stock (VVR) [MF]	SP	None	Dividends	\$5,001 - \$15,000	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Closed ended fixed income mutual fund					
JP Morgan SEP ⇒ Invesco Senior Loan ETF (BKLN) [EF]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	☐
JP Morgan SEP ⇒ iShares Broad USD High Yield Corporate Bond ETF (USHY) [EF]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	☐
JP Morgan SEP ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	☐
JP Morgan SEP ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
JP Morgan SEP ⇒ JPM Liquid Asset Fund (PJLXX) [BA]	SP	\$50,001 - \$100,000	Tax-Deferred		☒
JP Morgan SEP ⇒ Meta Platforms, Inc. - Class A (META) [ST]	SP	\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	☐
JP Morgan SEP ⇒ Nokia Corporation Sponsored American Depositary Shares (NOK) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
JP Morgan SEP ⇒ Nutrien Ltd. Common Shares (NTR) [ST]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☐
JP Morgan SEP ⇒ Pfizer, Inc. Common Stock (PFE) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☐
JP Morgan SEP ⇒ QUALCOMM Incorporated (QCOM) [ST]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☐
JP Morgan SEP ⇒ Schwab Value Advantage Money Fund Ultra Shares (SNAXX) [MF]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	☐
JP Morgan SEP ⇒ TuHURA Biosciences, Inc. - Common Stock (HURA) [ST]	SP	\$1,001 - \$15,000	None		☐
Lithia Properties, Inc. ⇒ Lithia Center [RP]	SP	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	☐
LOCATION: Valrico, FL, US					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
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* Investment Vehicle details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Novo Nordisk A/S Common Stock (NVO) [ST]	SP	05/08/2025	S (partial)	\$1,001 - \$15,000	☐
DESCRIPTION: Five put contracts in Novo Nordisk (NVO) expiring June 20, 2025 at the \$65 strike for \$4 per share.					
TuHURA Biosciences, Inc. - Common Stock (HURA) [ST]	SP	07/13/2025	P	\$50,001 - \$100,000	
Golden Touch Fund I, LLC [HE]	SP	07/17/2025	P	\$100,001 - \$250,000	
JPM Liquid Asset Fund (PJLXX) [BA]	SP	04/25/2025	P	\$50,001 - \$100,000	
JPM Liquid Asset Fund (PJLXX) [BA]	SP	09/14/2025	P	\$1,001 - \$15,000	
JP Morgan SEP ⇒ CBRE Global Real Estate Income Fund Common Shares of Beneficial Interest (IGR) [ST]	SP	12/16/2015	S (partial)	\$15,001 - \$50,000	☐
JP Morgan SEP ⇒ CBRE Global Real Estate Income Fund Common Shares of Beneficial Interest (IGR) [ST]	SP	12/16/2025	S (partial)	\$15,001 - \$50,000	☐
JP Morgan SEP ⇒ Invesco Senior Income Trust Common Stock (VVR) [ST]	SP	12/26/2025	S	\$50,001 - \$100,000	☐
Bromwell 529 - Aged Base Core 11-12 Fund [5P]	DC	08/15/2023	S	\$1,001 - \$15,000	☐
LOCATION: FL					
Bromwell 529 - Aged Base Core 13-14 Fund [5P]	DC	08/15/2023	P	\$1,001 - \$15,000	
LOCATION: FL					

* Investment Vehicle details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
The Bank of Tampa	Spouse Consulting Income	N/A
TAL Holdings, LLC	Spouse Consulting Income	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
MECEA	11/24/2025	11/30/2025	Tampa, FL - Doha, Qatar - Tampa, FL	0	☒	☒	☒

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Charles Schwab 401K (Owner: SP) - Individual 529 LOCATION: FL - Charles Schwab Account LML LOCATION: US - JP Morgan SEP (Owner: SP) LOCATION: US - Lithia Properties, Inc. (Owner: SP) LOCATION: US

- John Hancock 401K

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Laurel Lee , 08/13/2026